

# ***A Day in the Life of a Social Business***

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# SOCIAL CRM

Social CRM is about  
**Acquiring, Growing and  
Retaining** Customers

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# 360 Degree View of the Customer

## Traditional CRM Activities

- Customer Support
- Marketing
- Sales

## External data sources

- ERP
- Billings
- HR

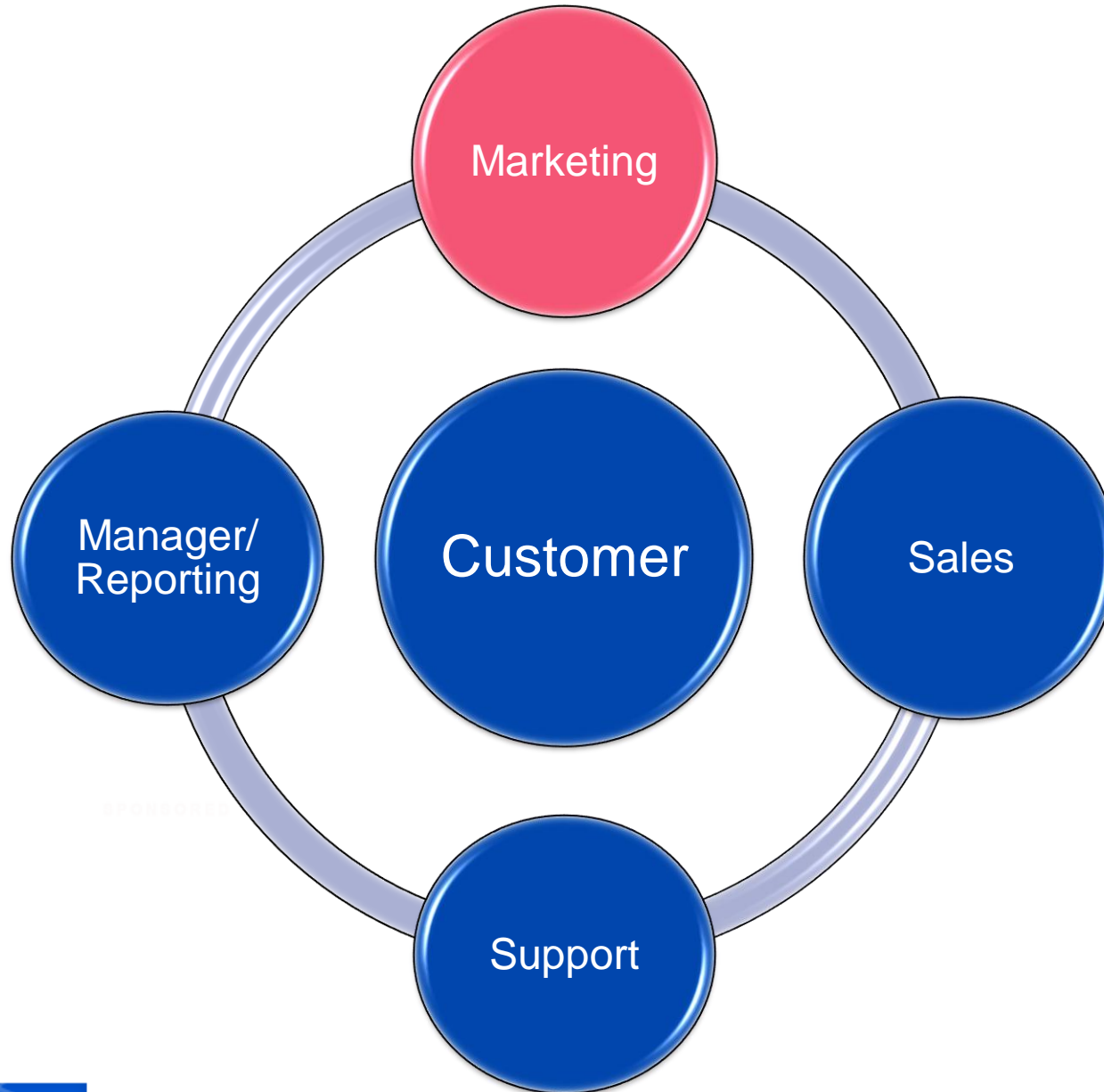


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## Social Media Networks

- Facebook
- Twitter
- LinkedIn

# Marketing Creates a Campaign



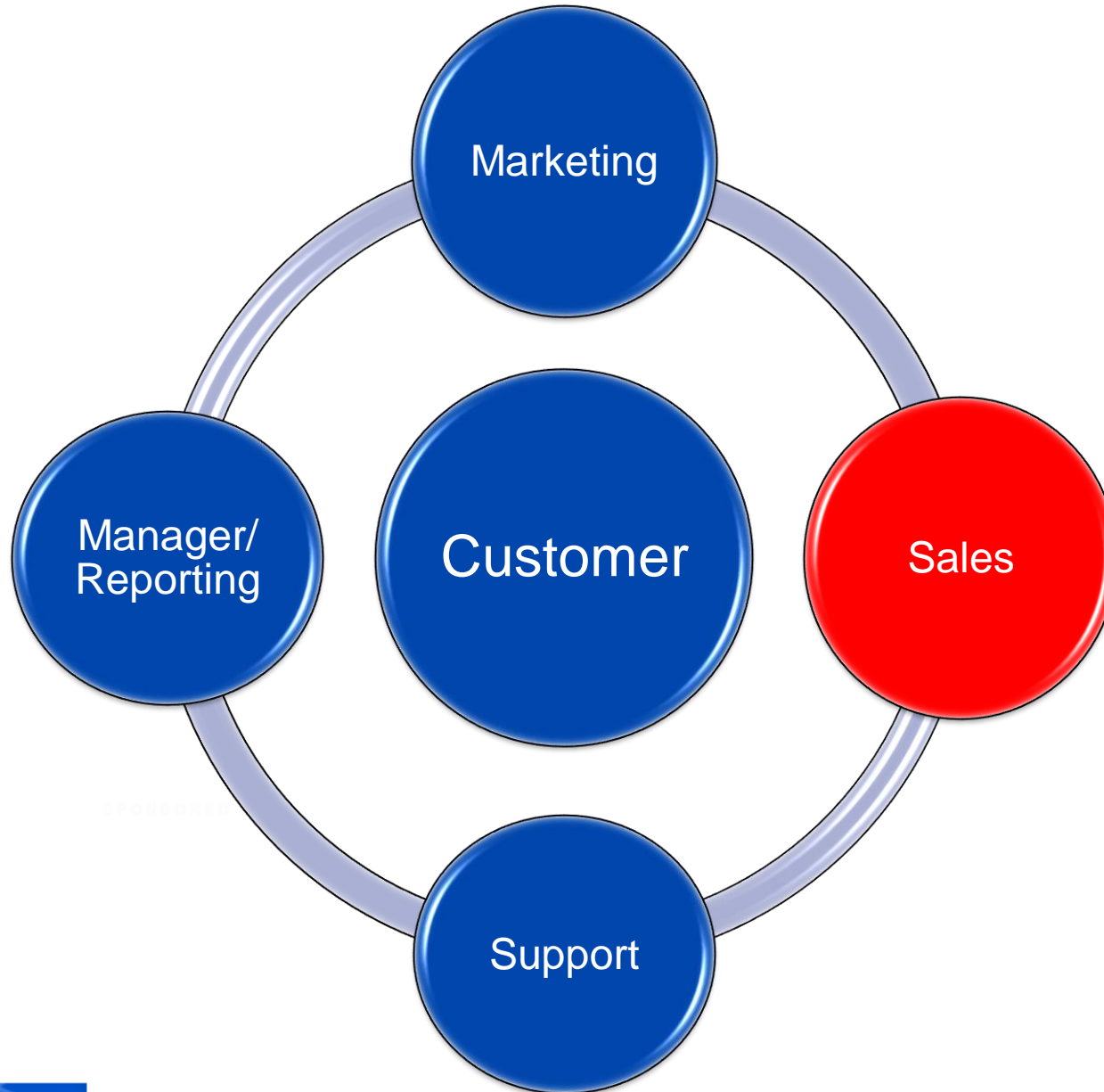
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# A Prospect Responds



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# Sales Works the Lead



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# Sales and the Prospect Interact Socially



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# Management Views the Forecast



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# Warm Handoff to Customer Support



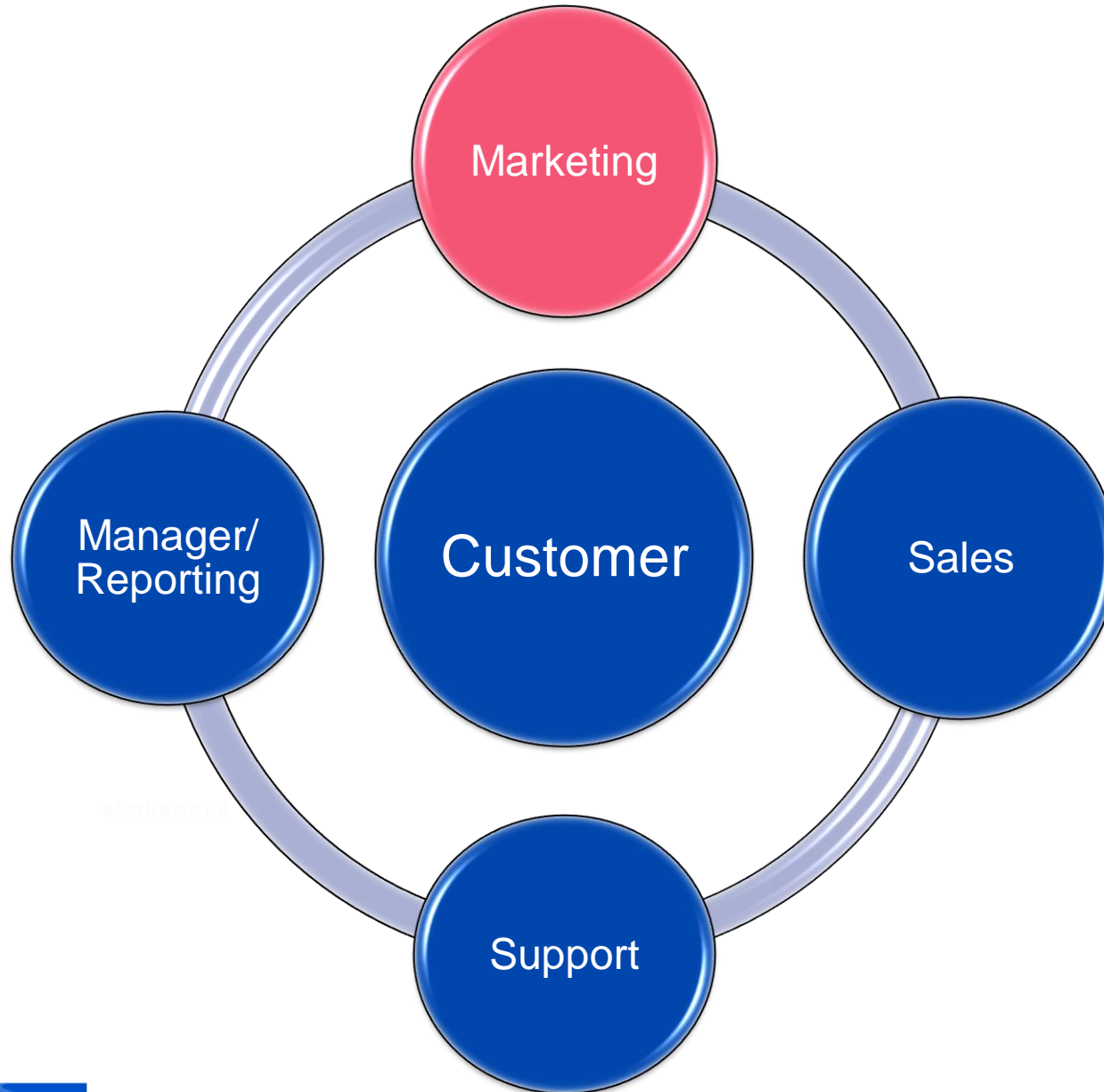
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# The Customer Opens a Support Ticket



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# Marketing Reviews the Campaign's ROI



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# The Social Business

## SugarCRM


- About SugarCRM
- Features
- News
- The Community
- Contact Us
- Customer Support

### Main Menu


- Home
- Company
  - Overview
- SugarCRM
  - Products
- More about SugarCRM
- FAQ
- The News
- Web Links
- News Feeds

### Resources


- SugarCRM
  - Home
- SugarCRM
  - Forums
- SugarCRM Help
- CRM Home




Jane Fitzpatrick  
Campaigns Marketing



Will Westin  
Account Manager



Regina Lazlow  
Customer Service Representative



Jim Brennan  
VP Sales

# The Customer



IMMUNETECH

Allergy | Technology | Health Care Providers | Research | Patients

Scientific advances have made it possible to solve a crime from a spot of blood or strand of hair. Similarly, a micro sample of blood contains the biomarkers necessary to diagnose disease.



ImmuneTech is applying complex technology to simplify the diagnostic process, making it accessible & affordable to all patients.

The company's first product is a test for *allergy*.



Tomi Fujimura,  
Director Marketing  
ImmuneTech

# In This Demo, You Will Observe:

- Marketing
  - Campaigns
  - ROI
- Sales
  - Pipeline management
  - Social and mobile CRM integration
- Management reporting
  - Business intelligence
- Support
  - Case management

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# Jane Fitzpatrick, Marketing Manager

- Jane is the Marketing Manager
- Her job is “to make the phones ring”
- She uses Sugar to manage all her campaigns

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# Marketing Automation in Sugar



- Campaign management
- Email marketing
- ROI measurement

# Other Marketing Automation Integrations Available on SugarExchange





# Tomi Fujimura, ImmuneTech

- Tomi is an existing lead in the lead nurturing program

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## Will Westin, Account Manager

- Will is an account manager
  - Will is assigned to the ImmuneTech account
  - Will uses Sugar, InsideView and LotusLive
  - Will is an big sports fan who never misses a game of his home team
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- Will stays connected using his BlackBerry smartphone



# Flexible, Intuitive and Open

- Flexible

- Sugar fits around the company's processes
- Workflow automates repetitive tasks

- Intuitive

- Easy to personalize and configure
- Simple web 2.0 interface

- Open

- Integrates with other business applications
- Integrates customer information across systems and devices

# Mobile and Social

## ● Mobile

- Native application for 90% of all smartphones (Android, Blackberry, iPhone/iPad)
- Mobile browser solution for all other

## ● Social

- External Collaboration: LotusLive, WebEx, Google Docs, GoToMeeting, Box.net, KnowledgeTree and Sharepoint
- Sales Intelligence: InsideView, Hoovers, Jigsaw
- Email integration: Sugar Plug-in for Outlook & Lotus Notes
- Social: Activity Streams, LinkedIn, Twitter and Facebook



# More Sales Automation in Sugar



- Custom sales processes
- Workflow automation
- Forecasting
- Products, quotes, contracts



## Jim Brennan, VP Sales

- Jim runs the sales organization
- Jim is a numbers guy, reporting and a good understanding of the state of the business are key
- Jim uses Sugar reporting and Cognos Business Intelligence
- Jim needs access to all this data on his iPad2



# Other BI Integrations on SugarExchange



GoodData

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# Regina Lazlow

## Customer Service Representative

- Regina is the Support Rep on the ImmuneTech account
- Her customers communicate with her through email, phone and the customer self-service portal
- She uses Lotus Notes

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# Customer Service in Sugar



- Support cases
- Bug tracking
- Automatic case creation
- Knowledge base
- Customer self-service portal

# Other Support Integrations on SugarExchange



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## Jane Fitzpatrick, Marketing Manager

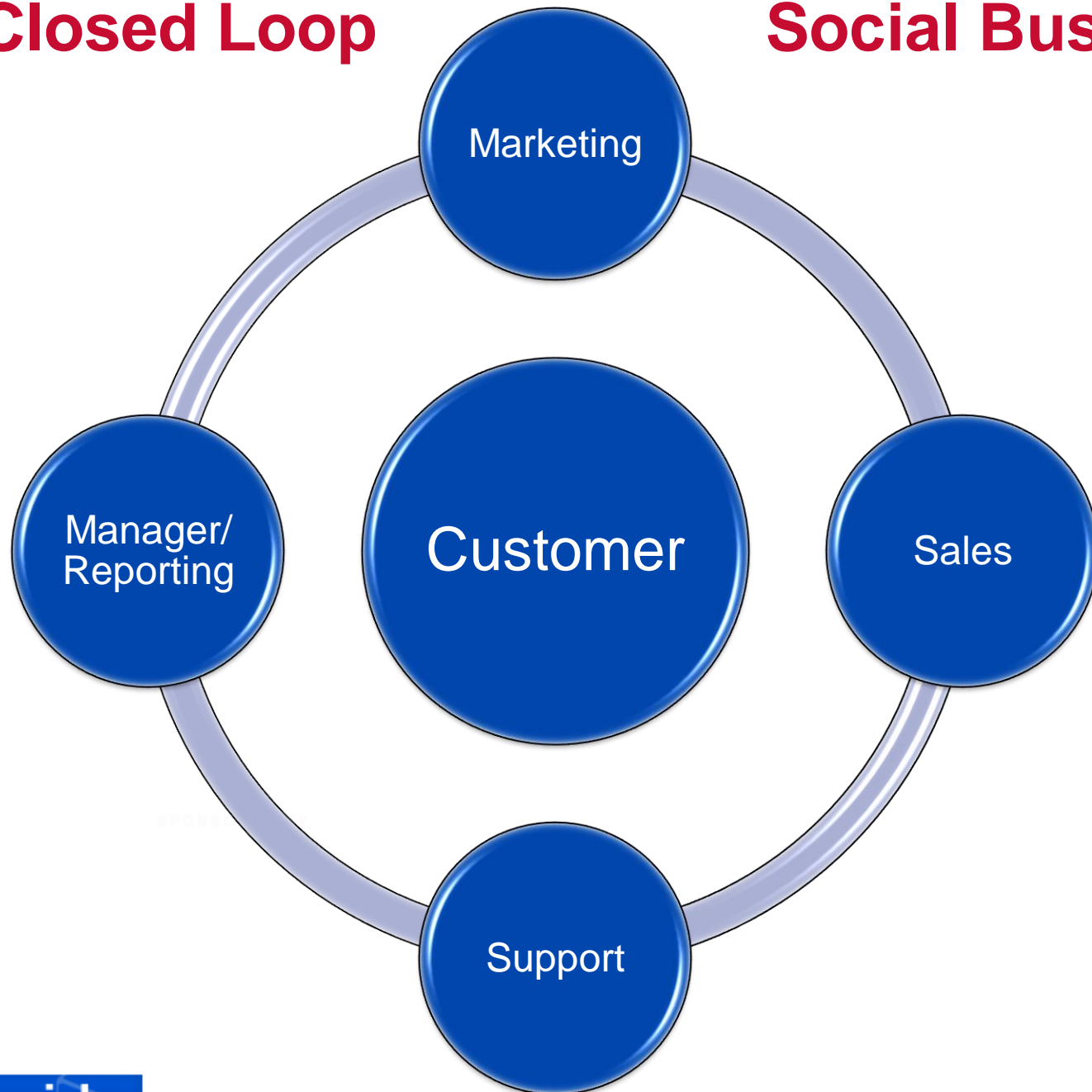
- Jane checks the how successful the campaign was by comparing its Return on Investment (ROI) to other campaigns

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# Closed Loop

# Social Business



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# You Saw How Sugar Is

- **Flexible** with easily configuration around processes
- **Intuitive** and easy for ends users to use & configure
- **Open** and integrated with IBM and 3rd applications
- **Global** and available in 25 languages
- **Mobile** with access from any smartphone and tablet
- **Social** with activity streams and built-in integrations

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# In Summary

- CRM is about Growing and Retaining Customers
  - Marketing
  - Sales
  - Customer support
- SugarCRM is CRM Made Simple
  - Sugar fits around your processes
  - Offers a suite of business solutions
  - Together with best of breed social tools
- SugarCRM Puts YOU in Control
  - Open cloud
  - Your data is yours
  - No vendor lock in

# CRM for the Social Business



Flexible. Intuitive. Open.

## SUGAR 6

CRM Made Simple™

